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2021Q3 +IDM —— 688396

:

2021 2021 69.28 (+41.70%) 16.84 (+145.20%) 2021Q3 24.73 +35.43% +2.60% 6.16 (+117.26% -7.73%)

300

	1M	3M	12M
	-10.7%	-32.0%	23.7%
300	0.4%	3.1%	4.2%

2021/10/27

	62.14
52	46.11-104.47
	82,030.51
	26,925.09
	132,009.19
	43,329.72
	2,952.81
%	0.00

2021H1

* * 2021-08-20

2020 IDM

* * 2021-01-20

■ **2021Q3 IDM**

2021Q3 37.86% +8.35pct +1.59pct 24.60% +7.57pct -2.78pct 2021Q3 6.02% +0.55pct +3.48pct 1.53% -0.09pct +0.09pct 6.35% +0.36pct +2.35pct -1.86% +0.29pct +1.04pct

■ **12**

2021Q3 2.20 +52.60% MOSFET

1 MOSFET MOSFET 300

2 IGBT IGBT IGBT

3

650V SiC JBS

IDM

5G

MOSFET IGBT

2021-2023

23.49/27.46/30.80 EPS

1.78/2.08/2.33 / PE 39/34/30

■

	2020	2021E	2022E	2023E
	6977	9321	10899	12310
	21	34	17	13
	964	2349	2746	3080
	140	144	17	12
	0.73	1.78	2.08	2.33
ROE(%)	9	18	18	16

Wind

	688396			62.14					2021/10/27
	2020A	2021E	2022E	2023E		2020A	2021E	2022E	2023E
ROE	9%	18%	18%	16%	EPS	0.73	1.78	2.08	2.33
	27%	36%	34%	34%	BVPS	8.02	9.80	11.88	14.21
	5%	6%	5%	5%					

5 2

2020 5 2018

2019

2020 8

2021

2021

2021 LED PCB

,

300

300

300

300 20%

300 10% 20%

300 -10% 10%

300 10%